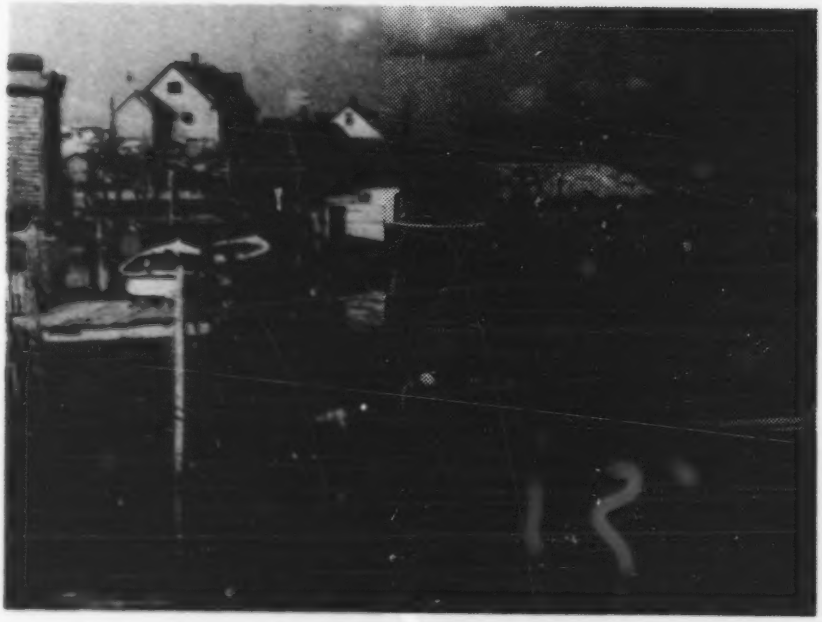
NOVA SCOTIA 1990 MARKETING PLAN

EXECUTIVE SUMMARY



NOVA SCOTIA

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Minister's Message

Nova Scotia is known far and wide as a scenic, culturally-unique, warm and friendly vacation destination. We've been a popular destination for more than 100 years and, in that time, we have developed a reputation as safe, clean and affordable with plenty of things to see and do.

But, in today's highly competitive tourism industry, reputation isn't enough to attract and maintain market share. We must bring our product to the marketplace with innovation, creativity, energy and style. Fortunately, in Nova Scotia, we have been able to do that with sound, intelligent, research-based marketing plans. Nova Scotia has also been able to make competitive gains through cooperative programs and award-winning promotions.

The 1990 Tourism Marketing Plan continues in this tradition. It is a workable, dynamic document that maximizes our potential in the marketplace and paves the way for future development.

Please read it carefully. Your comments and suggestions are appreciated. Your participation is welcome.

Honourable Roland J. Thornhill
Minister of Tourism and Culture

Message from the Director of Marketing

The age old question in marketing is what is more important ... the package, the promotion, the name, the distribution, or the advertising? Success, of course, comes from a full understanding of the market, the competition, sales methods, and positioning your product strategically within that framework. The answer to the question comes from the proper balance or "marketing mix" of all of a product's attributes.

Here in the Marketing Division, we have worked long and hard to achieve that "balanced marketing mix" on your behalf. In 1989 Ontario went down 25% in tourism, Montreal showed a - 16%, Nova Scotia turned in a +3%.

Going into 1990, we have changed several strategic directions to become even more effective. To make your money go further, we have put nearly $1,000,000 into new cooperative advertising opportunities with our Atlantic Partners. We have been successful in re-negotiating a bigger better Sea Sell. There are more new packages with stronger market penetration than ever before, such as the new Marine Atlantic Auto-Tours package with over one million distribution to key AAA members on the Eastern Seaboard. There are new wholesalers selling your product overseas and new carriers such as Globespan bringing them here. The Japanese market is being actively pursued. Charters from Vancouver, Calgary, Edmonton, Regina and Toronto by Conquest Tours will be airing each Saturday from May to October to offer low price airfares. A Superboard on the Gardiner Expressway in Toronto will be viewed by 85,000 people a day on a year-round basis, and we are introducing a major new regional promotion called "Sounds of Nova Scotia."

We feel sure that these new efforts, combined with your private sector promotions, will spell SUCCESS in 1990.

Have a great year.

Daniel G.M. Brennan
Director of Marketing

Introduction to the 1990 Marketing Plan

The 1990 Marketing Plan is designed to show the approach, the technique and the component elements that comprise the department's marketing efforts for 1990.

The marketing plan outlines Nova Scotia's various travel markets — who comes here and why and from where they come and how — and also outlines the elements used to attract and service those markets.

The 1990 Marketing Plan has been structured around four basic subjects — touring, outdoors, meetings and conventions, and travel trade.

Each subject has been expanded into five marketing elements — advertising, public relations and publicity, promotion, fulfillment, and development.

The plan also includes a business review, situation analysis, goals and strategies.

A special promotions section deals with Sea Sell '90 and with plans for 1991 and 1992.

Business Review — What the Research is Telling Us

Tourism is an extremely dynamic industry. Travel activity and product preferences are sensitive to demographic and social trends, economic conditions and industry deregulation. Now that the 80s have drawn to a close, it is an opportune time to look at what our statistics tell us. Through a number of well-entrenched market tracking systems, the Department of Tourism and Culture has been able to document some important trends in the industry.

Travel Mode & Receipts by Region

Mode - 1989	
Air	190,000
Auto	837,000
Recreational Vehicles	96,000
Motorcoach	54,000
	(May 15-Oct. 31 Overnight Only)

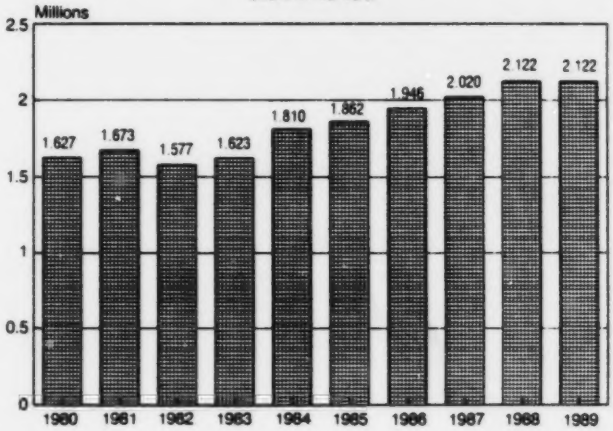
1989 Travel Receipts

Annapolis Valley	96.2 million
South Shore	99.8 million
Halifax/Dartmouth	153.6 million
Eastern Shore	19.9 million
Cape Breton	172.2 million
Northumberland Shore	145.9 million
Fundy Shore	107.4 million
	795.0 million

Room Sales

As shown by our accommodation reporting system, there has been considerable growth in tourism activity in Nova Scotia over the past decade. Room sales is a useful index because it represents real or uninflated growth. Room sales have expanded from 1.6 million in 1980 to an estimated 2.1 million in 1989. This is an average annual growth of 2.7%. Actually, sustained growth in room sales only began in 1984 so the growth rate during this period is considerably higher than that of the entire decade.

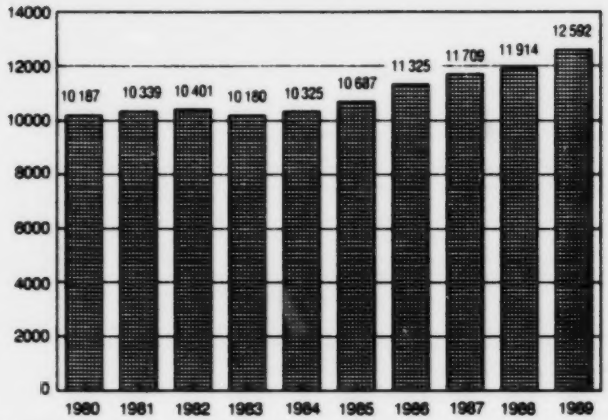
Room Sales in Nova Scotia
Fixed-Roof Accommodation
(1980-1989)



*Estimated
Source: Nova Scotia Tourism and Culture

The supply of fixed-roof accommodations in Nova Scotia has responded to the increase in demand. The room inventory in Nova Scotia was 10,187 in 1980. The room supply reached 12,592 in 1989. This growth represents an average annual increase of 2.1%. As with room demand, room supply did not achieve any significant growth until 1984.

Nova Scotia Fixed-Roof Accommodation Licensed Room Supply (1980-1989)

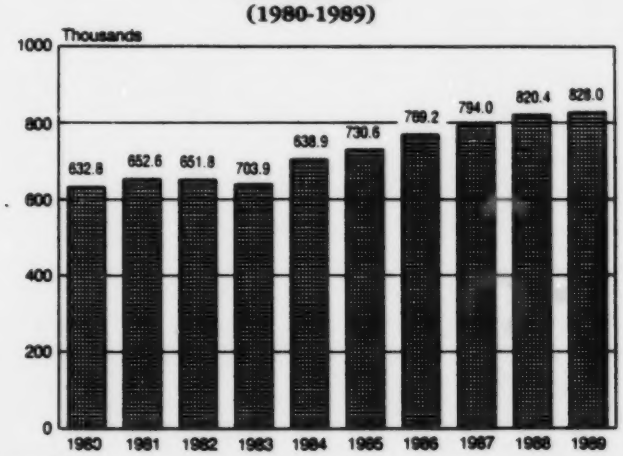


Source: Nova Scotia Tourism and Culture

Auto Visitation

Despite getting off to a slow start, overnight automobile traffic has grown considerably during the 1980s. Between 1980 and 1989, auto visitation grew by nearly 200,000 people with most of this growth occurring after 1983. The average annual growth during the past decade was 2.7%.

Overnight Auto Visitation to Nova Scotia (1980-1989)



*Estimated
Source: Nova Scotia Tourism and Culture

With the exception of 1983, there has been a steady increase in Canadian auto visitation to Nova Scotia. In 1988, Canadian levels were 28% greater than in 1981. The largest contribution to this growth came from Atlantic Canada which posted a 31% increase — the largest of any of Nova Scotia's major markets. The remainder of Canada lagged behind at 21%.

U.S. visitation fared well, but less strongly than the Canadian market, with a 19% growth. American growth was not quite as regular as the gains made in Canada, with declines in 1982 and 1987. American visitation is tied closely to New England levels, although the relationship is somewhat less direct in 1987 and 1988 when New England fared four to five points better than the U.S. as a whole.

The mid-Atlantic is holding the American market back from more situational growth. Visitation in 1988 was only 2% higher than in 1981. Only during two years — 1986 and 1988 — did the mid-Atlantic region send more visitors than in 1981. The most substantial growth in the U.S. came from Nova Scotia's less traditional markets, that is, outside of New England and the mid-Atlantic. Other U.S. regions achieved a 28% improvement over the past seven years. 1986 was a particularly good year when visitation climbed to 138% of 1981 levels.

Overnight Auto Person Volume Visitation to Nova Scotia by U.S. Markets (1980-1988)

Year	1980	1981	1982	1983	1984	1985	1986	1987	1988
USA(000's)	n/a	146.3	137.5	150.8	165.4	165.8	180.0	169.1	174.8
1981 Index	n/a	1.00	0.94	1.03	1.13	1.13	1.23	1.16	1.19
New England(000's)	n/a	66.6	62.6	68.4	73.9	74.5	80.8	80.2	82.9
1981 Index	n/a	1.00	0.94	1.03	1.11	1.12	1.21	1.20	1.24
Mid-Atlantic(000's)	n/a	37.9	34.5	37.7	37.3	36.5	41.5	36.5	38.6
1981 Index	n/a	1.00	0.91	0.99	0.98	0.96	1.09	0.96	1.02
Other USA(000's)	n/a	41.8	40.4	44.7	54.2	54.8	57.7	52.4	53.3
1981 Index	n/a	1.00	0.97	1.07	1.30	1.31	1.38	1.25	1.28

Source: Nova Scotia Tourism and Culture

Overnight Auto Person Volume Visitation to Nova Scotia by Canadian Markets (1980-1988)

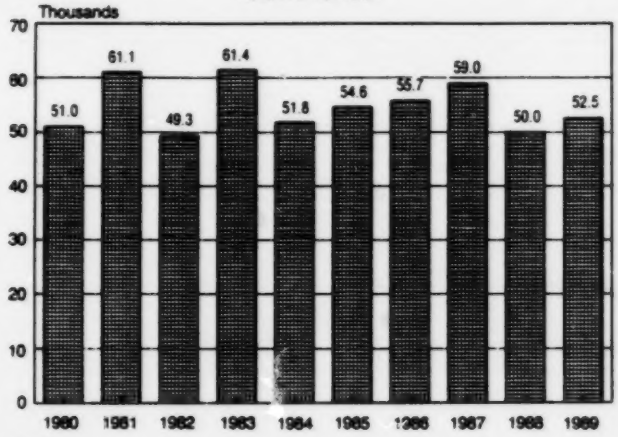
Year	1980	1981	1982	1983	1984	1985	1986	1987	1988
Canada(000's)	n/a	506.4	514.3	488.2	538.5	564.7	589.2	624.9	645.7
1981 Index	n/a	1.00	1.02	0.96	1.06	1.12	1.16	1.23	1.28
Atlantic Canada(000's)	n/a	319.1	333.1	316.3	348.4	366.0	379.2	408.1	418.4
1981 Index	n/a	1.00	1.04	0.99	1.09	1.15	1.19	1.28	1.31
Other Canada(000's)	n/a	187.3	181.2	171.9	190.1	198.7	210.0	216.8	227.3
1981 Index	n/a	1.00	0.97	0.92	1.01	1.06	1.12	1.16	1.21

Source: Nova Scotia Tourism and Culture

Motorcoach Visitation

Motorcoach traffic into Nova Scotia has not made any real gains over the past decade. Despite dramatic fluctuations in entry volumes, the province has not exceeded the visitor volume of 61,000 achieved in 1981. As a matter of fact, visitation during the past two years has been depressed — down 11-15% from 1987. On the whole, the average annual growth during the decade was less than 1%.

Motorcoach Visitation to Nova Scotia (1980-1989)



*Estimated

Source: Nova Scotia Tourism and Culture

As noted above, it is difficult to ascertain any major underlying trends in motorcoach visitation because of annual fluctuations. By and large these fluctuations are reflected in the regional visitation levels as well. However, some general observations are possible.

Canadian coach visitation from outside of the Atlantic region has been eroding. Only two regions have approached consistency in meeting or surpassing 1981 traffic — Atlantic Canada and other USA. Of those two, Atlantic Canada has performed the strongest, with most years reaching in excess of 120% of 1981 levels.

Overnight Motorcoach Person Volume Visitation to Nova Scotia by U.S. Markets (1980-1988)

Year	1980	1981	1982	1983	1984	1985	1986	1987	1988
USA(000's)	n/a	39.1	31.7	38.8	35.1	35.9	37.2	38.8	33.0
1981 Index	n/a	1.00	0.81	0.99	0.90	0.92	0.95	0.99	0.84
New England(000's)	n/a	10.0	7.4	7.9	8.1	7.2	8.0	9.6	8.6
1981 Index	n/a	1.00	0.74	0.79	0.81	0.72	0.80	0.96	0.86
Mid-Atlantic (000's)	n/a	13.9	10.7	14.6	11.0	12.3	13.4	14.0	11.8
1981 Index	n/a	1.00	0.77	1.05	0.79	0.88	0.96	1.01	0.85
Other USA(000's)	n/a	15.2	13.6	16.3	16.0	16.4	15.8	15.2	12.6
1981 Index	n/a	1.00	0.89	1.07	1.05	1.08	1.04	1.00	0.83

Source: Nova Scotia Tourism and Culture

Overnight Motorcoach Person Volume Visitation to Nova Scotia by Canadian Markets (1980-1988)

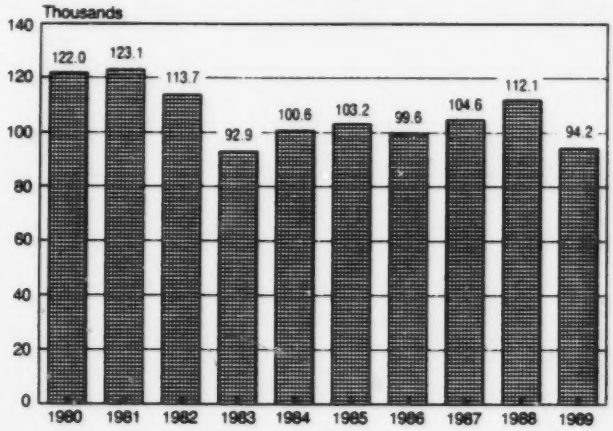
Year	1980	1981	1982	1983	1984	1985	1986	1987	1988
Canada(000's)	n/a	22.1	17.5	22.7	16.7	18.7	18.5	20.3	17.1
1981 Index	n/a	1.00	0.79	1.03	0.76	0.85	0.84	0.92	0.77
Atlantic Canada(000's)	n/a	7.1	4.7	9.0	7.7	9.2	8.9	9.1	8.6
1981 Index	n/a	1.00	0.66	1.27	1.08	1.30	1.25	1.28	1.21
Other Canada(000's)	n/a	15.0	12.8	13.7	9.0	9.5	9.6	11.2	8.5
1981 Index	n/a	1.00	0.85	0.91	0.60	0.63	0.64	0.75	0.57

Source: Nova Scotia Tourism and Culture

Recreational Vehicle Visitation

Despite a significant recovery between 1983 and 1988, there has been a major drop in RV traffic in Nova Scotia over the past 10 years. Recreational vehicle visitation fell from 122,000 to 94,200 people in 1989 — an average annual decrease of 2.6%.

Recreational Vehicle Visitation to Nova Scotia (1980-1989)



*Estimated
Source: Nova Scotia Tourism and Culture

Overall, between 1981 and 1988, American recreational vehicle traffic performed very well with an improvement. This contrasts strongly with a 22% fall in Canadian traffic. All of the growth from the U.S. came from regions outside of New England and the mid-Atlantic. The gains in this market were substantial — 43%. On the other hand, Canadian traffic was pulled down by a poor performance in Atlantic Canada. RV activity from this area was down 34% from 1981.

Overnight RV Person Volume Visitation to Nova Scotia by Canadian Markets (1980-1988)

Year	1980	1981	1982	1983	1984	1985	1986	1987	1988
Canada(000's)	n/a	84.2	75.5	56.9	62.2	60.7	56.9	60.6	65.9
1981 Index	n/a	1.00	0.90	0.68	0.74	0.72	0.68	0.72	0.78
Atlantic Canada(000's)	n/a	36.4	32.3	24.6	27.0	25.8	22.9	22.9	24.1
1981 Index	n/a	1.00	0.89	0.68	0.74	0.71	0.62	0.63	0.66
Other Canada(000's)	n/a	47.8	43.2	32.3	35.2	34.9	34.2	37.7	41.8
1981 Index	n/a	1.00	0.90	0.68	0.74	0.73	0.72	0.79	0.87

Source: Nova Scotia Tourism and Culture

Overnight RV Person Volume Visitation to Nova Scotia by U.S. Markets (1980-1988)

Year	1980	1981	1982	1983	1984	1985	1986	1987	1988
USA(000's)	n/a	38.9	38.1	36.0	38.4	42.5	42.9	44.0	46.2
1981 Index	n/a	1.00	0.98	0.93	0.99	1.09	1.10	1.13	1.19
New England(000's)	n/a	11.7	11.1	9.0	8.9	9.9	9.8	9.9	11.7
1981 Index	n/a	1.00	0.95	0.77	0.76	0.85	0.84	0.85	1.00
Mid- Atlantic(000's)	n/a	8.5	7.8	7.2	6.7	7.6	7.7	7.3	7.8
1981 Index	n/a	1.00	0.92	0.85	0.79	0.89	0.91	0.86	0.92
Other USA(000's)	n/a	18.7	19.2	19.8	22.8	25.0	25.4	26.8	26.7
1981 Index	n/a	1.00	1.03	1.06	1.22	1.34	1.36	1.43	1.43

Source: Nova Scotia Tourism and Culture

Camping

During the 80s, there has been a steady decline in the number of campgrounds in Nova Scotia. The inventory has fallen from 150 in 1980 to 133 in 1988 — a decrease of 11%. This translates into an average annual decrease of 1.3%. Although the number of sites has also fallen, the decline — 6%, has not been as rapid as that of the number of campgrounds as the average size of camps in Nova Scotia has been growing.

Also of note is the transition from unserviced sites to serviced sites. The number of serviced sites grew from 6,930 to 7,727 or 12%, whereas the number of unserviced sites fell by 1,430. The average annual change in serviced and unserviced sites has been 1.0% and 4.1% respectively since 1980.

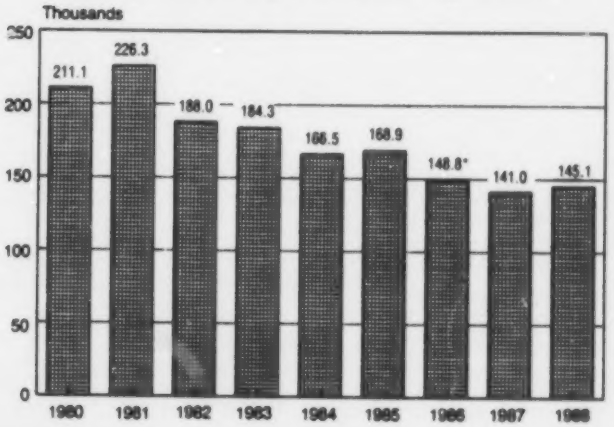
Nova Scotia Campgrounds Private and Municipal Inventory

Year	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
Campgrounds	150	150	147	147	143	140	138	133	133	131
Serviced Sites	6,930	7,374	7,167	7,199	7,356	7,351	7,706	7,757	7,727	7,682
Unserviced Sites	4,309	3,751	3,627	3,400	3,239	3,172	2,967	2,849	2,879	2,827
Total Sites	11,239	11,125	10,794	10,599	10,595	10,523	10,673	10,424	10,606	10,509

Source: Nova Scotia Tourism and Culture

Of considerable concern has been the dramatic fall in registrations in the province's private campgrounds. Although there were some years of modest recovery, registrations have dropped by 66,000 or 31% since 1980. This is the equivalent of an average annual decline of 4.1%

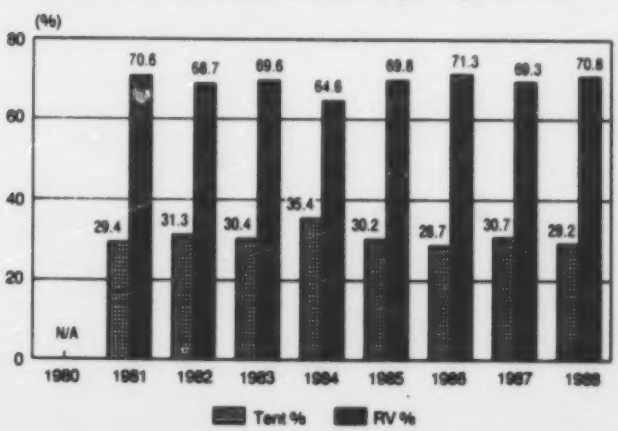
Nova Scotia Campgrounds
Private and Municipal Transient Registration



*Estimates prior to 1987 adjusted to compensate for campgrounds that did not participate in the survey
Source: Nova Scotia Tourism and Culture

Interestingly, the business mix at private campgrounds in the province has not changed substantially during the past decade. The ratio of tent registrations to RV registrations was virtually the same in 1988 — 29:71 — as it was in 1981. Only in 1984 was there a significant variation when the proportion of tent registrations rose to 35%.

Nova Scotia Campgrounds
Private and Municipal Camper Type Registrations



Source: Nova Scotia Tourism and Culture

There has been an interesting shift in camper demographics during the 80s. While the proportion of Canadian campers (other than Nova Scotia) has remained very stable at approximately 30%, there has been substantial movement in the Nova Scotian and American markets. There has been a steady decline in the percentage of resident registrations, while the U.S. proportion grew quite regularly. At the beginning of the decade, the Nova Scotian share was almost 50% and the American share was 20%. Eight years later local registrations had dropped by 18 points and U.S. activity was up by 14 points.

Nova Scotia Campgrounds
Private and Municipal
Camper Origins

Year	1980	1981	1982	1983	1984	1985	1986	1987	1988
Nova Scotia (%)	49.5	43.4	44.7	42.7	39.7	40.2	36.7	33.7	31.9
Other Canada(%)	29.9	32.0	29.8	28.7	30.3	28.4	29.8	30.6	29.0
USA(%)	20.0	23.7	24.4	27.7	29.0	30.7	32.7	34.5	34.4
Other Countries(%)	.6	.9	1.1	1.0	1.0	.7	.9	1.2	4.7

Source: Nova Scotia Tourism and Culture

Situation Analysis — Nova Scotia Image and Market Study

During the summer of 1989, Nova Scotia Tourism and Culture initiated a series of studies to help define the province's image and customer base. The object of the exercise was to develop a profile of Nova Scotia's dominant market, as well as to come to terms with our image as a tourist destination.

The initial phase of this study involved a comprehensive review of tourism research relating directly and indirectly to Nova Scotia. In turn, this information was used to generate an image and market summary. In order for this exercise to produce manageable information, it was necessary to generalize the results of some very complex studies. Despite the risk of oversimplification, it became evident after the review that there was a number of re-occurring findings. The fact that similar conclusions were being drawn in some diverse and unrelated studies serves to substantiate these findings.

The presentation of the results of the research review is not meant to imply that Nova Scotia should not be positioned differently to different markets. However, there must be a thread of continuity for Nova Scotia's tourism marketing. This thread will serve to develop a synergy among campaigns, thus maximizing total impact in all target markets. The object of this exercise is to define the imagery of Nova Scotia as well as to find the key motivators that attract visitors. This information will enable tourism officials to locate opportunities in the marketplace. Thus, product strengths will be identified and product constraints recognized and dealt with constructively. The following section attempts to relate the highlights of that exercise.

Findings

All indications are that our major market is the **touring segment.** Studies invariably tell us that people come, or would come, to Nova Scotia to view great scenery and for sightseeing tours.

While visitors participate in traditional touring activities such as exploring small towns, visiting museums, and attending special events, the emphasis is on the 'seeing' as opposed to the 'doing'. Participation in sports and other recreational activities is very low. Our market is seeking a passive experience as opposed to an active one.

Studies also show that our visitors are looking for a unique travel experience. This includes sampling new cultures as well as exploring new and different areas. However, it would appear that these travellers are wary of anything too foreign. In the 1986 U.S. Pleasure Travel Market Study, three of the six top-rated attributes desired

in a destination were "well known", "popular" and "well-known landmark".

The research also tells us that Nova Scotia's market travels to "get away from it all". They vacation to relax, unwind and to experience a change of pace. Indeed, the province's 1984 Exit Survey indicates that "getting away" was the number one vacation "want". If visitors are coming to Nova Scotia for a change of pace, it is a reduction in intensity they are seeking and not an increase. The province is seen as being tranquil and safe.

In terms of travel-party type, couples are the province's largest market. This, no doubt, is one of the reasons for Nova Scotia's success in the honeymoon market. Solitary travellers are also a significant market, and although many of these are travelling for business reasons, a number of studies indicate that visiting friends and relatives (VFR) is important to this group. Families are travelling to Nova Scotia, but they are very under-represented. Ironically, even in markets such as Toronto, where Nova Scotia is perceived as a family destination, it is the couples and mature families that the destination attracts.

Nova Scotians have a reputation for being very friendly and receptive hosts. In fact, the Halifax Perception Study indicated that this was our greatest strength. As well, the third most-frequently cited reason as to why tourists would recommend Nova Scotia as a destination was the province's good hosts reputation (1984 Exit Survey). Despite this, a relative weakness for the province may be the service-oriented attitude in the industry.

It has long been known that Nova Scotia attracts an upscale, more affluent clientele. This is confirmed by numerous studies. It would also appear that the American market is somewhat better off economically than their Canadian counterparts.

Current Research

The second phase of this image and market study involves several hundred telephone surveys conducted in five important American markets. The results of these indepth interviews are currently being compiled. Whereas past research has focused primarily on tangible vacation benefits, this study is intended to develop an understanding of intangibles such as the 'personality' or 'flavour' of Nova Scotia. In doing this survey, we have recognized that a vacation is a totally-integrated experience that includes emotional benefits such as escape and memories. Survey methodology will be developed to collect information or elements such as destination awareness, aided and unaided advertising awareness, source of advertising recall, content recall, familiarity with the province, level of involvement with specific destinations, vacation motivators, the image of Nova Scotia relative to major competition and basic demographics. Conducted on an annual basis, this system will provide the tourism industry with a means for tracking image shifts as well as awareness and propensity levels.

GOALS

— Increase awareness of Nova Scotia as a travel destination in primary and developmental markets.

— Increase wealth generated by tourism by focusing on high-yield markets and by developing initiatives designed to increase length-of-stay.

— Maximize in-province spending by encouraging Nova Scotian residents to vacation in the province.

— Market Nova Scotia as an all-year travel/vacation destination.

— Increase cooperative promotional and marketing opportunities among the Atlantic Provinces.

— Increase travel to Nova Scotia from within the region.

— Increase group travel opportunities to/within Nova Scotia.

— Increase the quantity and dollar value of free publicity on Nova Scotia.

Strategies

The development of the Nova Scotia Tourism and Culture *Marketing Program is derived from an on-going analysis* of Nova Scotia's market position, formal and informal input discussions with industry partners, private sector operations, regional tourist associations and Tourism Canada.

The distillation of information and the development of preliminary program strategies are the result of "think tank" workshops. The results are the overall strategy statements upon which program managers develop individual action plans to help fulfill the department's objectives.

Strategies for 1990 are:

— Marketing thrust will continue to concentrate in Central Canada and the Northeastern USA.

— Advertising/promotion programs will be used to create awareness and generate enquiries.

— The higher yield mass mode market will receive increased effort through co-op programs with carriers and tour operators.

— Literature will be used to provide detailed information on the destination and to assist potential visitors in planning their trips.

— Editorial coverage will continue to be actively pursued with the emphasis on international writers.

— The development of the overseas market will continue in 1990 in the United Kingdom and Germany.

— Nova Scotia will attend selected trade and consumer shows with appropriate private sector partners.

— The promotional event concept will be utilized with a "Sounds of Nova Scotia" theme.

— Tight market segmentation will continue to form the basis for program implementation.

— Research will be used to monitor visitor traffic and program evaluation.

— Nova Scotia will continue to pursue cooperative marketing programs with other public and private sector partners. The Atlantic Canada Program will be revised to reflect greater emphasis on product enhancement and professional development.

— Tourism marketing will play an active role in attracting the meetings and conventions market in cooperation with appropriate partners.

— In-province travel by Nova Scotians will be encouraged through increased promotional activities.

— Winter product development and promotion will be used to encourage regional winter business.

— The Taste of Nova Scotia program will be further developed as a vehicle to upgrade the "eating-out" experience.

— Resource materials will be developed in the festival management area.

— "Sea Sell" will be implemented in partnership with the four Atlantic Provinces and the Government of Canada.

— Opportunities surrounding the September '90 conference of the "Society of American Travel Writers" in Atlantic Canada, will be fully exploited to promote Nova Scotia as a travel destination.

Advertising Overview

For 1990 and beyond, Nova Scotia has many definite goals.

It is common knowledge that the vacation travel market is currently undergoing major changes resulting in part from:

— new air linkages, domestic and international

— heightened recognition of the travel industry as a major economic force

— increased competition

— maturation of some vacation destinations with increased travellers desire for the "new" and the "different"

— a growing older market with increased disposable income and leisure time.

With this changing climate, it is important for Nova Scotia to develop a strong competitive position. To best understand our market and what motivates potential travellers, we have participated in an Ethnology Research Study. This research will be used to provide a solid foundation from which creative advertising strategies will be developed and executed for 1990 and beyond.

U.S. — Spring and Summer Advertising Campaign

Atlantic Canada Cooperative

Nova Scotia has participated in an Atlantic Canada co-operative advertising campaign to:

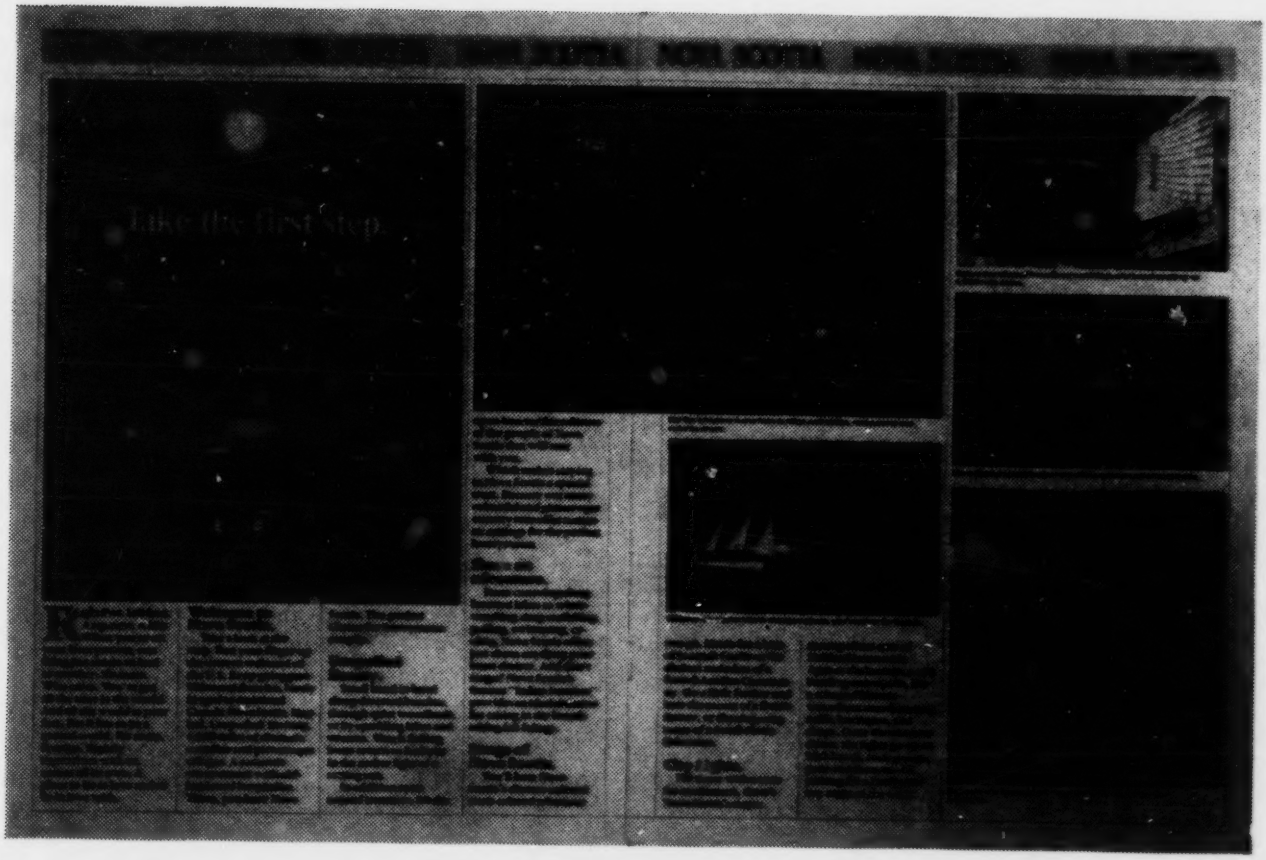
— Increase the awareness of Canada's East Coast as a travel destination within chosen market segments.

— Position each province within an umbrella campaign which will target markets that usually travel to more than one province.

— Spend shrinking advertising dollars more effectively in a highly competitive marketplace.

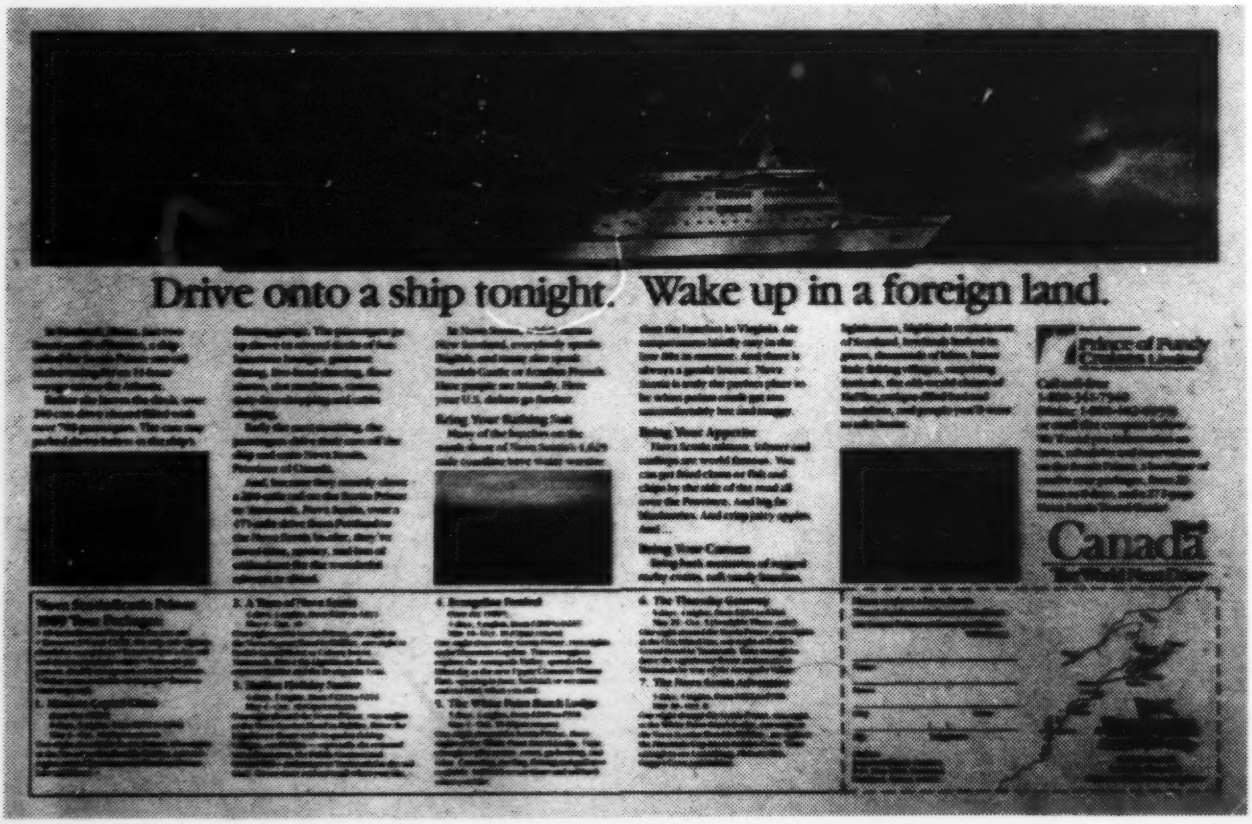
Segmentation

We continue to maintain our strategy of segmentation within the U.S. market. By targeting specific interest groups in specific market areas, we can reach with impact and frequency the right audience to travel to Nova Scotia.



Co-operative Partners

Traditional co-operative advertising campaigns will be maintained with Prince of Fundy Cruises Ltd. and Marine Atlantic. In the New England and mid-Atlantic regions, the two ferry services will be promoted in magazines and newspapers.



Travel Channel

To increase awareness of the province, Nova Scotia will test a media buy on the cable network — Travel Channel. This will expand market reach and provide a strong Nova Scotian image. This program will be measurable through the use of a toll-free number.

Strategy

High-impact sections in vertical-market magazines were selected for the Canada's East Coast co-operative program.

Regular advertising in selected vertical-market magazines reaching specific markets will be placed from February to June.

In partnership with Marine Atlantic and Prince of Fundy Cruises, newspaper campaigns will run in New York, Massachusetts, Rhode Island, Connecticut, Maryland and Pennsylvania to achieve a 65-70% coverage of market.

We will repeat our rotogravure magazine double truck ads in five primary markets in the United States in co-operation with Prince of Fundy Cruises. Last year, Nova Scotia received more than 20,000 enquiries from placing this ad only once in five different magazines.

Sea Sell '90 will incorporate a multi-media approach to reach consumers and specially-targeted segments.

Direct mail, newspaper advertising, public relations and special promotional programs will generate interest and encourage a positive response to visiting the *Scotia Prince* during Sea Sell in Boston, Baltimore and Philadelphia.

Target

In order to develop and execute a new creative strategy for the 90s, it was important to understand the dynamics of vacation travel as it relates to the vacationer.

Our target market in the U.S. is predominantly the New England and mid-Atlantic states with a secondary emphasis on the South Atlantic.

The primary target group is adults 35 to 60 years with an average household income of $35,000+.

Because of Nova Scotia's segmentation strategy, the male/female skew is dependent on the audience being addressed.

In the case of the honeymoon market, the target audience is younger and predominantly female.

The outdoor market will be targeted to an audience with various interests in hunting, fishing, camping, hiking, canoeing, cycling, birdwatching and whalewatching.

Advertising will target the large touring segment as well as the ever-increasing mature market.

On the trade side, we will be reaching travel agents and motorcoach operators to promote Nova Scotia as a package destination.

Advertising efforts will be directed toward meeting and convention planners and influencers for:

— the corporate market
— the association market
— the incentive travel market.

Execution

In Canada's East Coast program, full-colour eight-page sections will run in *Trailer Life*, *Brides*, *Travel Agent*, *AAA*, *Natural History* and the *Cowles Group (Early American Life*, *Country Journal*, *British Heritage*, *Civil War Times*, *American History Illustrated)*.

In order to increase frequency and achieve cost effectiveness in selected magazines, we are testing 2/3 page four-colour ads as opposed to our traditional one-page ads.

The creative design and copy of the ads will be developed to appeal to the specific market segments.

In co-operation with our ferry service partners, Marine Atlantic and Fundy Cruises Ltd., newspaper advertising will carry a hard sell message promoting vacation packages to Nova Scotia.

Full-colour, double-truck ads will be placed in the rotogravure magazines of the *New York Times*, *Hartford Courant*, *Boston Globe*, *Baltimore Sun* and *Philadelphia Inquirer* promoting the *Scotia Prince* ferry service to Nova Scotia.

The Travel Channel program will include 356, thirty-second commercials and 360 2-minute interviews over a twelve-week media buy period.

Evaluation

By incorporating toll-free numbers and the use of coupons in all print media advertising with specific codes, we can determine the number of inquiries from each magazine or newspaper ad.

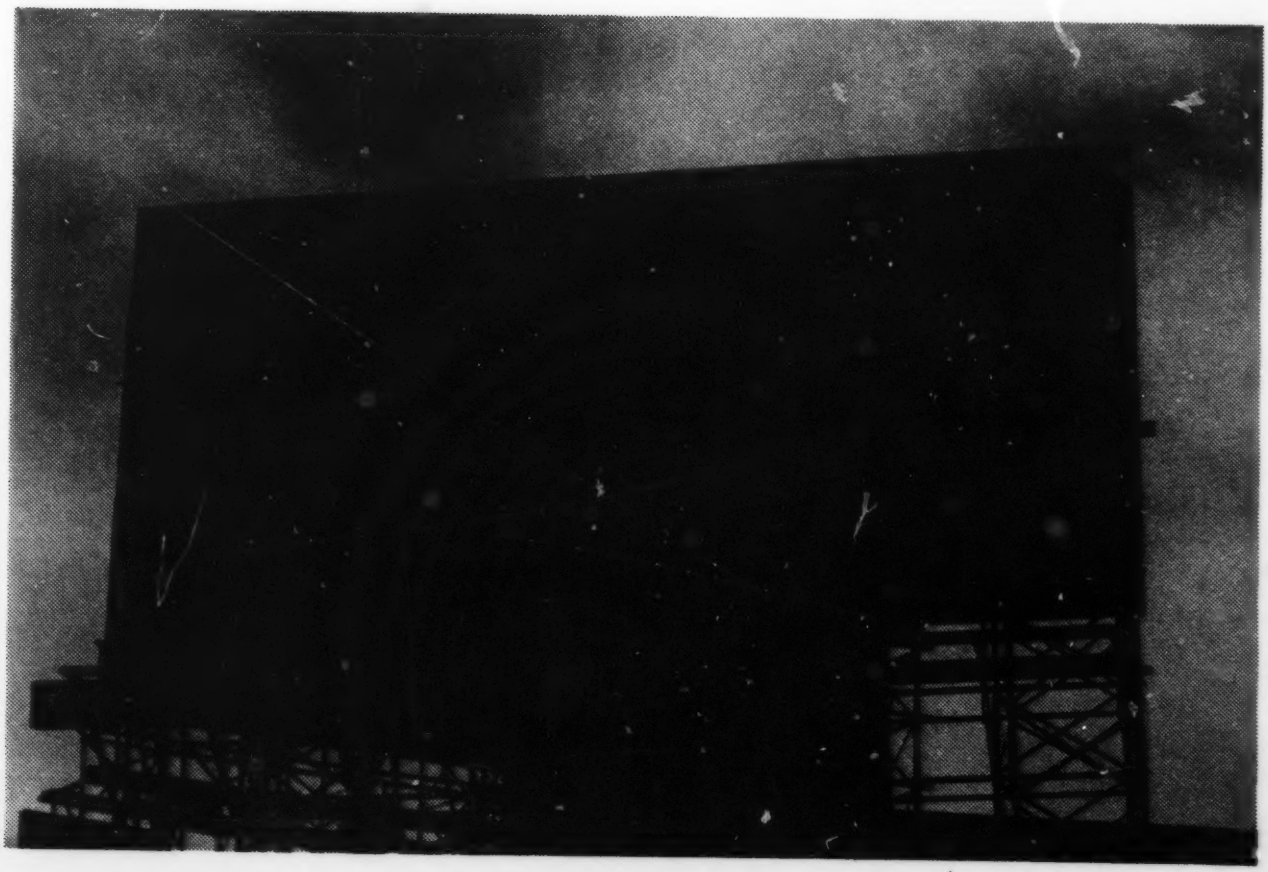
A selected group of publications will then be evaluated through a U.S. research house in New Bedford, Massachusetts, Sea Research. Inquiry numbers are collected and a conversion study occurs in September.

Because of this valuable knowledge, we are able to calculate our cost-per-inquiry to our cost-per-conversion. From the conversion study, we can determine visitor expenditures which in turn provides tourism revenue generated by advertising investment.

Canada — Spring and Summer Advertising Campaign

High Awareness

To increase awareness of Nova Scotia in the Toronto market, a superboard on the Gardner Expressway will carry several product messages in 1990. This program ran successfully in 1989 with five creative executions throughout the year.



Honeymoons

To reach the lucrative honeymoon market in Canada, a high-impact section will be inserted in *Wedding Bells* magazine and *La Mariage*, the French equivalent of *Wedding Bells* in Quebec

Co-operation

The Fiesta program will continue to promote Nova Scotia and Prince Edward Island as a desirable tour package destination. Newspaper advertising will promote a hard sell price message to consumers in Ontario.

Outdoor

To target the French market in Quebec a series of colour ads will be inserted into the outdoor publication *sentier Chasse-Pêche*.

Meetings and Incentive Travel

The focus for 1990 will be on the domestic market. In co-operation with Meetings and Incentive Travel Magazine, a twelve-page lure section will be developed targeting this market. This will be inserted in the April issue with overruns produced as stand-alone brochures. Four-colour ads will be placed in a series of national magazines.

Atlantic Regional Advertising

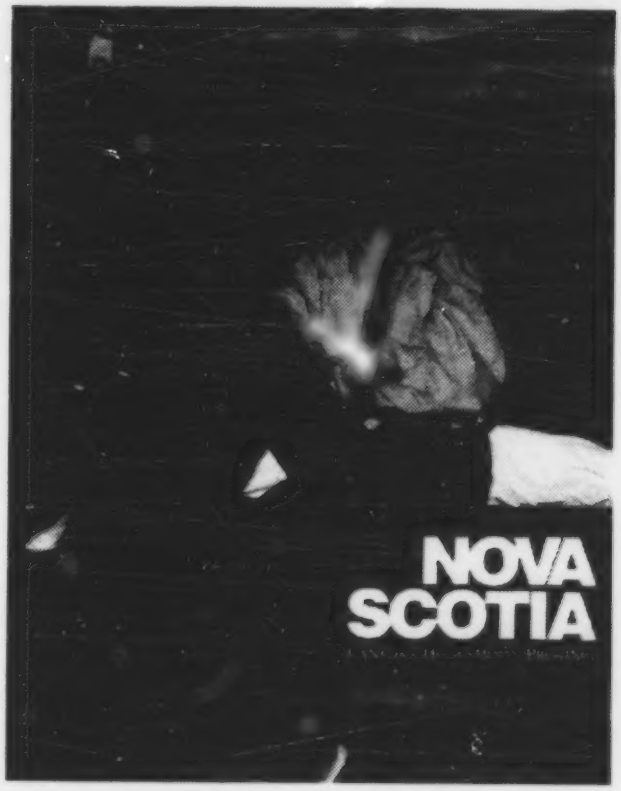
Regional advertising is a campaign to encourage Atlantic Canadians to vacation in Nova Scotia and to encourage Nova Scotians to vacation at home. This year's promotional theme is the "Sounds of Nova Scotia". This theme will tie in with all aspects of the program creating a synergistic effect.

Radio will form the base with a combination of 30-second and 60-second spots airing throughout May to September.

Newspaper ads will run in all major markets promoting Festivals and Events throughout the province.

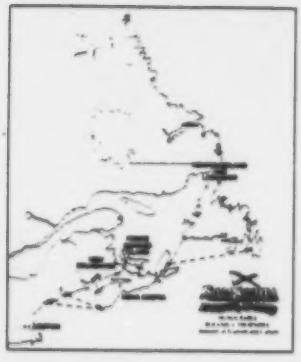
Television will be used to complement the program in major markets airing 15- and 30-second spots.

Collateral material such as posters and brochures will be produced to be used by Festival organizers throughout the province.



NOVA SCOTIA

NOVA SCOTIA
so much to see



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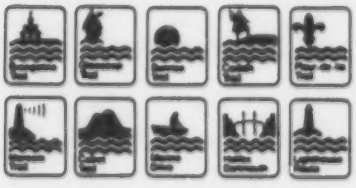
The Sounds of Nova Scotia



Signatures, Logos and Themes

The "Nova Scotia" masthead is a consistent element in everything we do. It is positioned at the top of advertisements, and at the top of front covers for literature pieces.

The Nova Scotia "So Much to Sea" logo is mandatory in all advertisements and on all literature. The logo is usually positioned in the lower right corner of the advertisement or page.

The Nova Scotia locator map is an integral part of all U.S. advertisements and appears in literature distributed in the U.S.

Generating consumer response is our objective. A toll-free number(s) is required in all materials; and, coupons are required wherever possible.

The "Sounds of Nova Scotia" is the 1990 promotional theme and the logo/image will be used on all materials produced within the regional campaign.

The Nova Scotia Travelways system is depicted by a series of ten logos used to encourage travelers to leave the main highways and explore the province.

Touring — Advertising — General

Publication	Circulation	Ad Size	# of Insertions	Date
Boston Magazine	130,740	1 P 4C	3	April/May/June
New England Monthly	107,028	2/3 P 4C	2	April/June
Smithsonian	2,243,311	2/3 P 4C	2	March/April
Travel Channel				
Yankee	1,003,948	Full Page Insert Card	1	March
Brides (ACTP)	458,769	Special Section	1	Feb/March
AAA (ACTP)	799,915	Special Section	1	March/April
Cowles (ACTP)	1,100,254		1	March-May
Brides (Card)	458,769	1 P BRC	1	Apr/May

Marine Atlantic Co-op

Magazines	Circulation	Ad Size	# of Insertions	Date
Travel & Leisure — Eastern Edition	450,000	2/3 Pg. 4C	2	March, June
American Express Independent Traveler's Guide to Canada	450,000	Page 4CB	1	April
Conde Nast Traveler East of Mississippi	400,000	2/3 Pg. 4C	2	March, May
National Geographic Traveler — Eastern Edition	450,000	2/3 Pg. 4C	2	March/April May/June
Yankee Magazine's Travel Guide	375,000	2/3 Pg. 4CB	1	April
Endless Vacation Eastern Region	200,000	2/3 Pg. 4C	1	April
Automotive Club Magazines				
AAA Today — East of Mississippi	900,000	2/3 Pg. 4C	1	March/April
Regional Lifestyle Magazines				
Yankee	1,000,962	Page 4CB	3	April, June, July
New England Monthly	115,047	2/3 Pg. 4CB	1	May
New Yorker	608,138	2/3 Pg. 4C	2	April 23, May 29
Retirement Lifestyle Magazines				
Modern Maturity-New England & mid-Atlantic	4,545,461	Digest 4C	1	April/May
New Choices	556,265	Digest 4C	1	May

Marine Atlantic Co-op

Magazines	Circulation	Ad Size	# of Insertions	Date
Sport Fishing Magazines				
In-Fisherman	399,110	Page 4CB	2	April/May
Fishing World-Northeast/mid-Atlantic	359,999	Page 4CB	3	Mar/Apr. May/Jun. Jul/Aug

Newspapers	Circulation	Ad Size	# of Insertions	Date
Boston Globe — ROP	787,029	31.50	2	May
Springfield Union News	157,668	31.50	2	May/June
Providence Journal	261,763	31.50	3	April, June
Portland Sunday Telegram	142,930	31.50	2	May
N.H. Sunday News	92,834	31.50	3	May, July
Hartford Courant	307,878	31.50	2	May, June
Worchester Telegram		31.50	1	May
New York Times — ROP	1,663,530	31.50	3	April, May, June
Long Island Newsday	703,424	31.50	2	May, June
Bergen Record (Newark)	279,521	31.50	2	May, June

Radio	Dates	Estimated # of Spots
Boston/Worchester	May 3-6	50
	May 17-20	50
Hartford/New Haven		40
		40
Providence	April 26-29	40
	May 31-June 3	40
Springfield	May 17-20	35
Portland		35
		35
Northeast — In-Fisherman Radio Network		6,240

Fundy Cruises Co-op

U.S. Magazine

Publication	Circulation	Ad Size	# of Insertions	Date
Modern Maturity	4,545,461	2/3 P 4C	1	April/May

U.S. Rotogravure Magazine

Publication	Circulation	Ad Size	# of Insertions	Date
Philadelphia Inquirer Magazine	995,571	DPS 4C	2	April
New York Sunday Times	1,601,085	DPS 4C	2	April
Boston Globe Rotogravure	787,385	DPS 4C	2/16	April
Providence Journal Inquirer Magazine	261,763	DPS 4C	2	April
Northeast Magazine C/O Hartford Courant	223,448	DPS 4C	1	April

U.S. Newspapers

New York

Publication	Circulation	Ad Size	# of Insertions	Date
New York Daily News	1,568,862	31.50	3	May/June
New York Times	1,601,085	31.50	8	April/May/June
Long Island	706,440	31.50	5	April/May
Gannett Westchester Nsp.	190,792	31.50	5	April/May/June

Massachusetts

Publication	Circulation	Ad Size	# of Insertions	Date
Boston Globe	786,829	31.50	8	April/May/June/July
Boston Herald	252,128	31.50	3	April/May/June
Springfield Republican	151,238	31.50	4	April/May
Lawrence Eagle Tribune	55,015	31.50	4	April/May
Worcester Telegram Gazette	129,640	31.50	3	April/May
New Bedford Standard Times	50,989	31.50	5	April/May
Brockton Enterprise	64,071	31.50	5	April/May

Rhode Island

Publication	Circulation	Ad Size	# of Insertions	Date
Providence Journal	259,145	31.50	4	April/May/June

Connecticut

Publication	Circulation	Ad Size	# of Insertions	Date
Hartford Courant	303,272	31.50	4	May/June
Bridgeport Post Telegram	90,784	31.50	5	April/May/June
New Haven Register	138,752	31.50	5	April/May/June
Wilmington News Journal	133,597	31.50	2	April

Fundy Cruises Co-op

New Hampshire

Publication	Circulation	Ad Size	# of Insertions	Date
Dover Foster's Democrat	28,425	31.50	5	April/May
Nashua Telegraph	31,907	31.50	5	April/May
New Hampshire News	91,652	31.50	4	April/May

Maine

Publication	Circulation	Ad Size	# of Insertions	Date
Portland Telegram	138,018	31.50	5	April/May/June

New Jersey

Publication	Circulation	Ad Size	# of Insertions	Date
Bergen County Record Tribune	278,298	31.50	5	May/June
Burlington County Times	47,350	31.50	3	April/May
Camden Cherry Hill Courier	101,308	31.50	5	April/May/June
Newark Star Ledger	665,085	31.50	3	April/June

Pennsylvania

Publication	Circulation	Ad Size	# of Insertions	Date
Allentown Call	180,030	31.50	5	April/May
Harrisburg Patriot — News	165,986	31.50	5	April/May/July
Philadelphia Inquirer News	995,571	31.50	3	April
Pittsburgh Press	548,785	31.50	5	April/May

Air Canada Co-op — Newspaper

Publication	Market	Ad Size	# of Insertions	Date
Le Droit	Ottawa (FR)	540 MAL B/1C	3	April
The Citizen	Ottawa (E)	540 MAL B/1C	3	April
La Presse	Montreal (FR)	540 MAL B/1C	3	April
The Gazette	Montreal (E)	540 MAL B/1C	3	April
Toronto Star	Toronto	660 MAL B/1C	3	April
The Spectator	Hamilton	540 MAL B/1C	3	April
Free Press	Winnipeg	540 MAL B/1C	3	April
Leader Post	Regina	540 MAL B/1C	3	April
Star Phoenix	Saskatoon	540 MAL B/1C	3	April
Calgary Herald	Calgary	540 MAL B/1C	3	April
Journal	Edmonton	540 MAL B/1C	3	April
Sun	Vancouver	540 MAL B/1C	3	April
Province	Vancouver	540 MAl B/1C	3	April
Le Soleil	Quebec City	540 MAL B/1C	1	April
Times	Oshawa	540 MAL B/1C	1	April
Examiner	Peterborough	540 MAL B/1C	1	April
Standard	St. Catherines	540 MAL B/1C	1	April
Record	Kitchener/Waterloo	540 MAL B/1C	1	April
Free Press	London	540 MAL B/1C	1	April
Times-News/Chr.-Journal	Thunder Bay	540 MAL B/1C	1	April
Star	Windsor	540 MAL B/1C	1	April
Times Colonist	Victoria	540 MAL B/1C	1	April

Regional Campaign

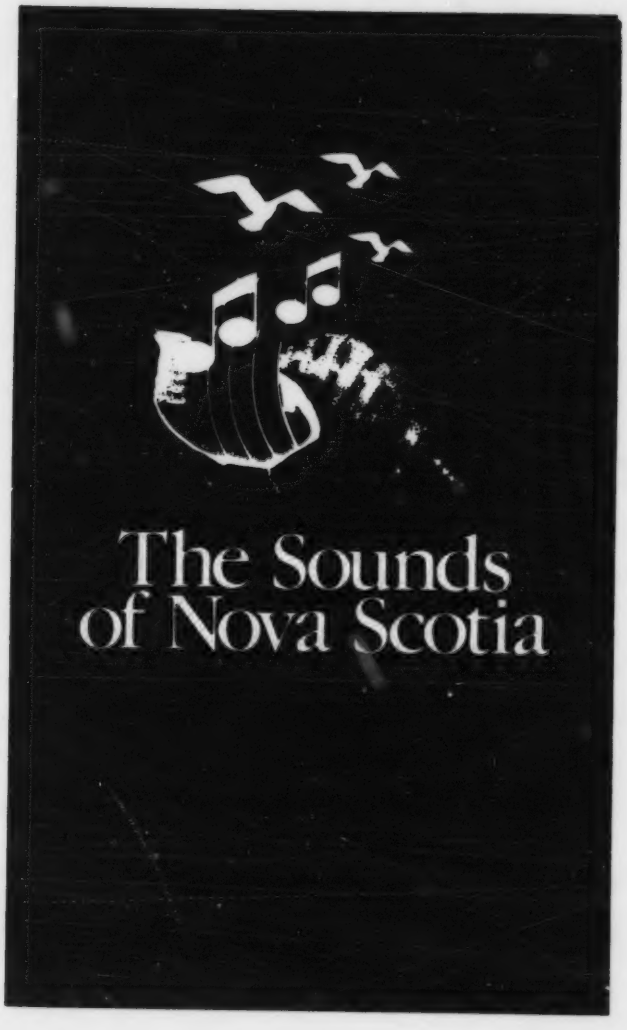
Market	Weight level	# of spots per week	# of weeks	Date
Television				
Mainland Nova Scotia	250/350 GRPs	50 - 65	10	June/July/Aug
Sydney	250/350 GRPs	50 - 65	9	June/July/Aug
Charlottetown	250/350 GRPs	50 - 65	9	June/July/Aug
New Brunswick	250/350 GRPs	50 - 65	9	June/July/Aug
Radio				
Halifax/Dartmouth	150/200 GRPs	60	10	June/July/Aug
Sydney	150/200 GRPs	20	10	June/July/Aug
Truro	150/200 GRPs	20	8	June/July/Aug
Annapolis Valley	150/200 GRPs	20	8	June/July/Aug
Bridgewater	150/200 GRPs	20	8	June/July/Aug
New Glasgow	150/200 GRPs	20	8	June/July/Aug
Yarmouth	150/200 GRPs	20	8	June/July/Aug
Charlottetown	150/200 GRPs	20	10	June/July/Aug
Moncton	150/200 GRPs	20	10	June/July/Aug
Fredericton	150/200 GRPs	20	10	June/July/Aug
Saint John	150/200 GRPs	20	10	June/July/Aug

Newspaper 1/2 P B/W

Publication	Ad Size Lines	Freq.	Date
Fredericton Gleaner	900	1	June/July
Moncton Times Transcript	900	1	June/July
Saint John Telegraph Journal/ Evening Times Globe	900	1	June/July
Amerst Daily News	900	1	June/July
Chronicle Herald Mail/Star	900	1	June/July
Halifax Daily News	900	1	June/July
New Glasgow Evening News	900	1	June/July
Cape Breton Post	900	1	June/July
Truro Daily News	900	1	June/July
Charlottetown Guardian & Patriot	900	1	June/July

Newspaper Insert	*Circulation	Size of Insert	# of Insertions	Date
New Brunswick				
Fredericton Gleaner	31,300	8-pages	1	June
Moncton Times-Transcript	51,000	8-pages	1	June
Saint John Telegraph Saint John Telegraph-Journal/Evening Times Globe	66,000	8-pages	1	June
Nova Scotia				
Amherst Daily News	4,500	8-pages	1	June
Cape Breton Post	32,600	8-pages	1	June
Truro Daily News	9,600	8-pages	1	June
Halifax Daily News	24,500	8-pages	1	June
New Glasgow Evening News	12,500	8-pages	1	June
Chronicle Herald	100,000	8-pages	1	June
Mail-Star	63,500	8-pages	1	June
Charlottetown Guardian Patriot	26,600	8-pages	1	June

***all advertising insertion dates are subject to change**



Touring — Promotions

The "Sounds of Nova Scotia" are calling in 1990. The theme will encompass Nova Scotia's collection of over 400 community festivals, events, celebrations and attractions incorporating the province's rich musical heritage, culture, performing arts, folklore and sounds of nature.

Special programs supporting the campaign include financial assistance to activities planned in support of the theme, public and private sector cooperative tie-ins, promotional support material and merchandising packages.

"The Sounds of Nova Scotia" will provide the platform for the province's regional advertising campaign designed to encourage in-province travel and to attract Atlantic Canadians to vacation in Nova Scotia. The elements of the campaign include print advertising in regional dailies, an eight-week campaign of 30- and 60-second spots broadcast over regional radio stations and 15-second television commercials over regional networks.

Touring — Public Relations and Publicity

Editorial Services provides information through media releases to the travel trade and general public and provides direct liaison with visiting and local media. The goal of editorial services is to generate "free advertising" in travel related media — both print and electronic. Editorial services works with key travel writers selected to visit Nova Scotia on familiarization tours. In 1990, Media Marketplaces will be attended in Boston and New York to generate new contacts with such writers.

The National convention of the *Society of Travel Writers*, to be held in Atlantic Canada September 6-15, presents a unique opportunity for Nova Scotia. The first portion of the conference takes place in Saint John, New Brunswick, followed by several days of touring the four Atlantic Provinces and a two-day conference wrap-up in Halifax.

The S.A.T.W. Conference provides an opportunity for Nova Scotia to reach travel markets not accessible within traditional advertising budgets. It is estimated that $8M worth of publicity will be created and the benefits will be felt well into the year 2000.

A series of promotional *videos* has been produced for release in 1990. "Touring and Sightseeing" and "History and Culture" are targeted specifically to the touring sector. These videos will be available on request, and are being distributed through the Canadian Department of External Affairs, broadcast media, travel trade, etc.

Rugged Nova Scotia

Majestic Nova Scotia

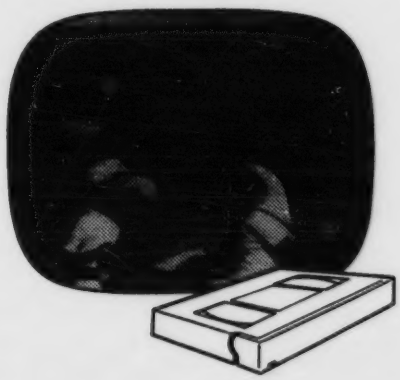
Explore 178-year-old town via historic lighth...

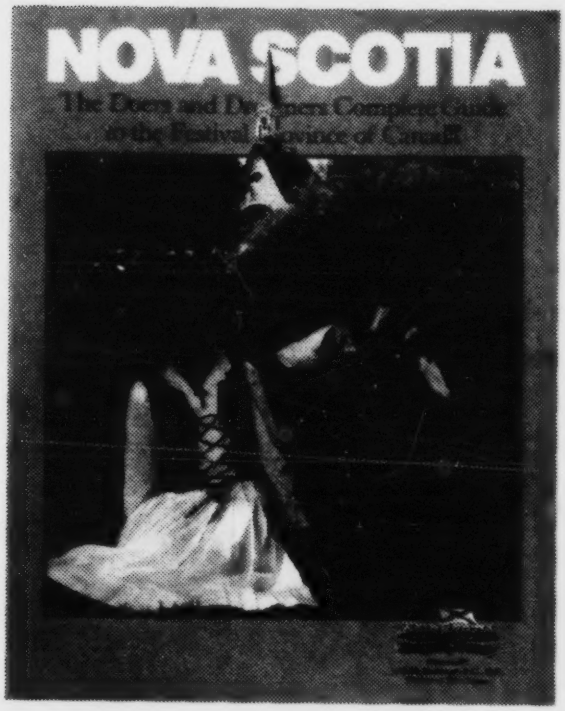
Visitors descend on super Nova Scotia's star tourist attractions

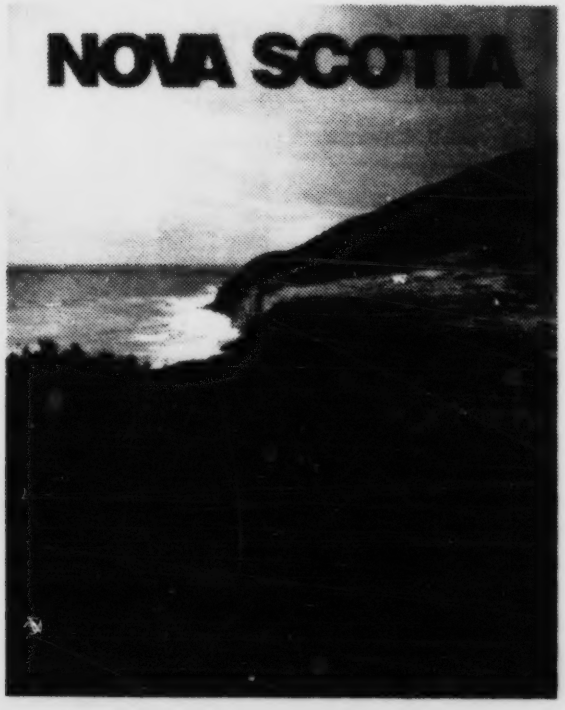
'We're sort of a town in a can — just add water and stir.'

—Lew Rogers, director of tourism for Halifax.

Nova Scotia's rocky shore beckons to visitors







Touring — Fulfillment & Servicing

Literature is an integral part of the marketing cycle, providing important information to potential visitors to help "close the sale."

The generation of enquiries through advertising, promotions, editorials, trade and consumer shows is only the first step in attracting visitors.

Enquiries come by telephone through Check In and our Portland, Maine, office and by mail.

The 272-page Nova Scotia Travel Guide is the primary information piece, with 450,000 being produced for distribution in 1990. Approximately one-half of these Guides will be distributed in fulfillment of enquiries, and the other half through the network of Travel Information Centres. The 1990 Guide features a new 22-page colour section focusing on the trailway system to encourage travellers to travel the scenic routes. A fold-out "Trip Planning Map" has also been inserted to assist travellers.

Other literature produced by the Department for the touring market includes a 26-page lure section (a stand-alone version of the colour section which appears in the Travel Guide), an Official Highways Map (produced in conjunction with the Department of Transportation and Communications), and a Festival and Events Poster.

Touring — Development

The *Attractions and Events* program provides assistance and support to the growth and development of high-quality attractions and events to increase regional traffic and to increase revenue.

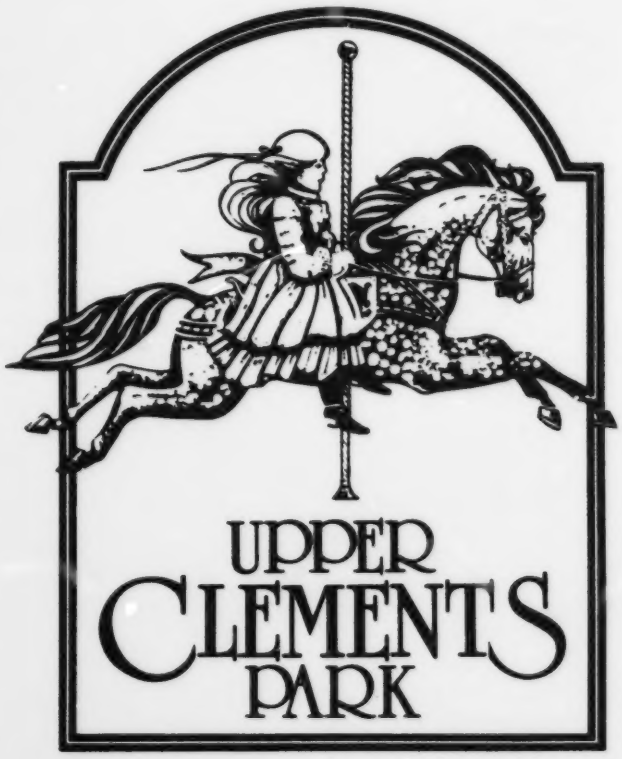
World-class events such as the World Junior Canoe Championships (Dartmouth, 1989) and the World Figure Skating Championships (Halifax/Dartmouth, 1990) have helped to raise awareness of Nova Scotia not only as an excellent venue for sporting events, but as an attractive travel destination. The opening of Upper Clements Park in 1989 adds to the mix of other natural attractions such as Fortress of Louisbourg and the Cabot Trail.

In 1990, the Attractions and Events section will continue to operate the "A&E" Incentive Grants Program to assist festival and event organizers with the upgrading of their product and enhancement of their marketing efforts. This grant program is administered through the regional tourist associations, which receive applications and make recommendations to the Department.

Building upon the success of the Canadian Association of Festivals and Events Conference which was held in Halifax in November, 1989, the 1990 Attractions & Events program will feature educational opportunities for festival and event organizers through workshops and seminars.

The Special Project Funding Program will continue to support major new initiatives.

- Resource materials developed to assist the attraction/event industry will include: a quarterly newsletter, a generic media kit, ideas file, entertainment opportunities and general planning and development manual.
- A generic brochure designed to provide information about Nova Scotia's annual schedule of attractions and events will be produced for enquiry fulfillment and general distribution at trade shows, travel marketplace, information centres, etc.
- Cooperative Discount coupon programs, point of sale promotions, packaged tour itineraries, etc. will be developed and coordinated in cooperation with the hospitality industry businesses.
- The festival and event calendar and contact list will be produced for distribtuion to organizers, industry, travel publications, etc.



A Touch Of Tradition
A Whole Ton Of Fun!

The *Taste of Nova Scotia* is an identifiable program of dining quality designed to create a favourable exposure of Nova Scotia's products and services.

Restaurants throughout Nova Scotia which apply and meet the program criteria, become identified as Taste of Nova Scotia members.

In 1990, the Taste of Nova Scotia will be promoted through a Guidebook listing and describing all members. Some 160,000 copies of this guide will be distributed through Nova Scotia Travel Information Centres and through member establishments. Some 100,000 promotional brochures will also be produced for distribution at industry and consumer shows, and major promotions throughout Atlantic Canada.

Awareness of the Taste of Nova Scotia Program will be increased in New England as well, through participation in the Yankee Magazine Apple Pie Bakeoff (Boston, October '90) and through media promotions during Sea Sell '90.

The *Nova Scotia Office of Family History* is designed to assist the thousands of people who travel to Nova Scotia each year to trace their ancestry, or discover their "roots". This information network will provide a knowledgeable source for researchers and assist them in their travels throughout the province.

The Nova Scotia Office of Family History will work in cooperation with the Public Archives of Nova Scotia and the many organizations throughout the province currently servicing the genealogical researcher.

Meetings and Incentive Travel — Advertising

CANADA — MAGAZINE

Publication	Circulation	Ad Size	# of Insertions	Date
Conventions & Meetings Canada	10,430	1 P 4C	1	Annual
Meetings & Incentive Travel	11,140	Special Section	1	April
Report on Business Magazine	331,200	2/3 P 4C	3	April/July/September
N.S. Convention Planning Guide		1 P 4C	1	

UNITED STATES — MAGAZINE

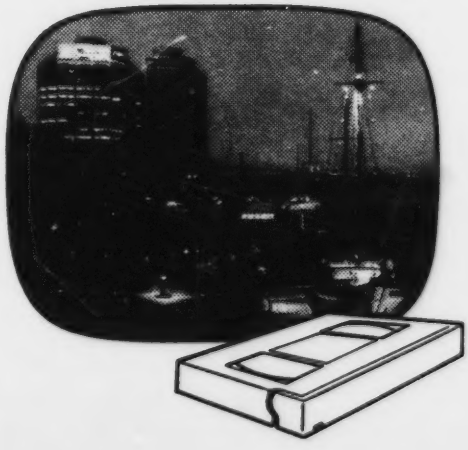
Publication	Circulation	Ad Size	# of Insertions	Date
Successful Meetings	77,216	1 P 4C	2	June/September
Successful Meetings Sourcebook	77,299	1 P 4C	1	Annual
The Wall Street Journal, Eastern	806,458	420 L, B/W	3	June/July/August

Meetings and Incentive Travel - Public Relations and Publicity

A series of specialized *familiarization tours* will be conducted for meetings, conventions and incentive travel planners on an individual basis. Tourism Marketing will also cooperate with Nova Scotia destinations to conduct *site visitations* for this market segment.

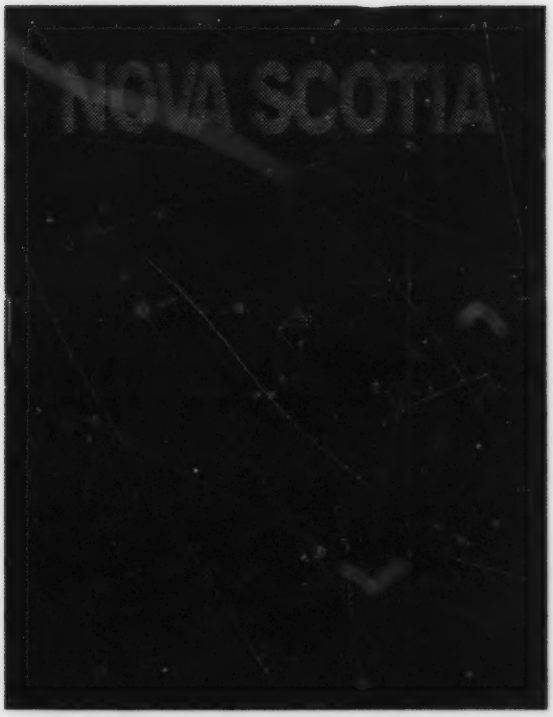
Promotional items, primarily Nova Scotia flag pins and "Order of Good Time" certificates will be provided to convention organizers to enhance delegate satisfaction. Attendance enhancement will also be encouraged through direct mail, sending the Nova Scotia Travel Guide to all registered convention delegates, and through the provision of promotional items to be used as sales aids in attracting convention business.

A new *video* aimed specifically at the meetings and convention market will be released in 1990 for use in convention sales presentations and destination promotions.



WTCC
World Trade and Convention Centre

Tourism Halifax



Meetings and Incentive Travel — Promotions

In 1990, Tourism Marketing will introduce Nova Scotia's Incentive Travel product at the *Incentive Travel and Meetings Executives Show* in Chicago.

Tourism Marketing will also cooperate with Nova Scotia destinations wishing to exhibit in meeting and convention planners *shows* as need requires.

Sea Sell '90 will emphasize contact with meeting, convention and incentive travel planners by way of special functions in Boston, Baltimore and Philadelphia. In Baltimore, executive motorcoaches will be used to transport planners from the Washington, D.C. area market to the Sea Sell functions. A concerted effort will be made to involve trade-related media in Sea Sell.

We will also cooperate with Nova Scotia destinations on special *promotions* targeted to meeting and convention planners. In March/April, 1990, we will work with the World Trade and Convention Centre in Halifax to host special functions in Ottawa and Montreal in conjunction with the eastern Canada tour of Symphony Nova Scotia. The *Bluenose* II 1990 promotional visit along the eastern seaboard will also incorporate special functions for meeting and convention planners.

Meetings and Incentive Travel — Fulfillment and Servicing

The primary item of *literature* directed to the meetings and incentive market will be a new "Meetings and Incentive Travel Planners Guide" produced in conjunction with Meetings and Incentive Travel Magazine. This twelve-page lure section will cover the meetings and incentive travel product throughout the province.

Tourism Marketing will also cooperate with a private sector operation in the publication of a "Convention Planners Guide." This Guide will provide listings of meeting and convention facilities throughout the province as well as information on convention services and other suppliers.

A lure/shell brochure is also available to meeting and convention planners to help promote their Nova Scotian events.

Meetings and Incentive Travel — Development

In 1990, Nova Scotia will institute a computerized data base and tracking system to maintain information on planners who have been contacted through advertising and promotions.

Travel Trade — Advertising, Public Relations & Publicity

A twelve-page, high-impact, four-colour section will be inserted in the U.S. trade publication *Travel Agent Magazine*. This will run in the March/April issue reaching a circulation of 53,793.

The *Familiarization (FAM) Tour Program* has been designed to familiarize potential travel influencers with the Nova Scotia travel experience.

Tour operators, tour wholesalers, travel writers (freelance and dedicated), and travel agents representing Nova Scotia's major market areas are invited to participate in the FAM tour program.

In 1989, the media value from all sources generated by this program is roughly estimated at $2 million when expressed in advertising terms.

In 1990, a more pro-active approach will be used in conjunction with the Department of External Affairs to request specific media to achieve greater results from the FAM tour program.

Promotional items are available to tour operators as a means of enhancing visitor satisfaction. "Order of Good Time" certificates, welcoming visitors into the oldest social club in North America, are a popular item with motorcoach operators. These certificates are personalized by the Department and provided to the tour participants while they are in the province.

AMERICAN BUS ASSOCIATION

Rendez-vous Canada

BLUENOSE II

Travel Trade — Promotions

In 1990, the Travel Trade Division will represent the Nova Scotia tourism product at the following *trade shows and conventions:*

Canada
Rendezvous Canada — April 1990
Ontario Motorcoach Association Show — October 1990

U.S.A.
National Tour Association Show — November 1990
American Bus Association Show — December 1990
National Motorcoach Marketing Network — February 1991
International Travel Exposition (ITEX) — March, 1990

As well, there will be "Atlantic Canada Expert" seminars held during Sea Sell '90 in conjunction with Travel Agent Magazine whereby travel agents can participate and achieve "A.C.E." designation. Tour wholesalers and tour operators will also be invited to visit the ship for special promotional functions. For the first time, it is expected that several American Tour Operators will participate in the trade show component of Sea Sell in order to promote their Atlantic Canada product.

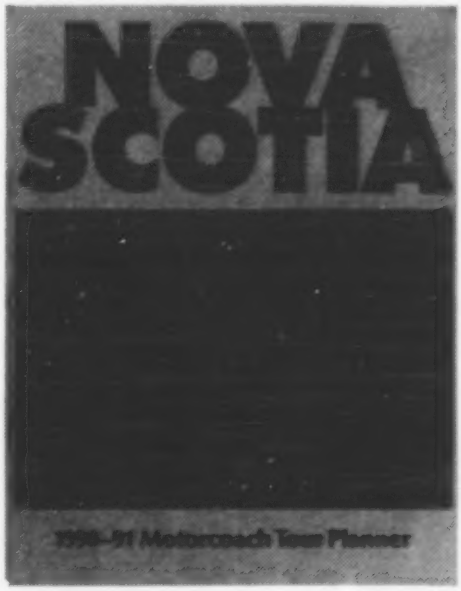
In June of 1990, Nova Scotia's sailing ambassador *Bluenose* II will conduct a promotional tour along the eastern seaboard of the U.S.A. Special functions for travel writers, tour wholesalers and tour operators will be hosted in each port of call, in order to take advantage of this unique promotional opportunity.

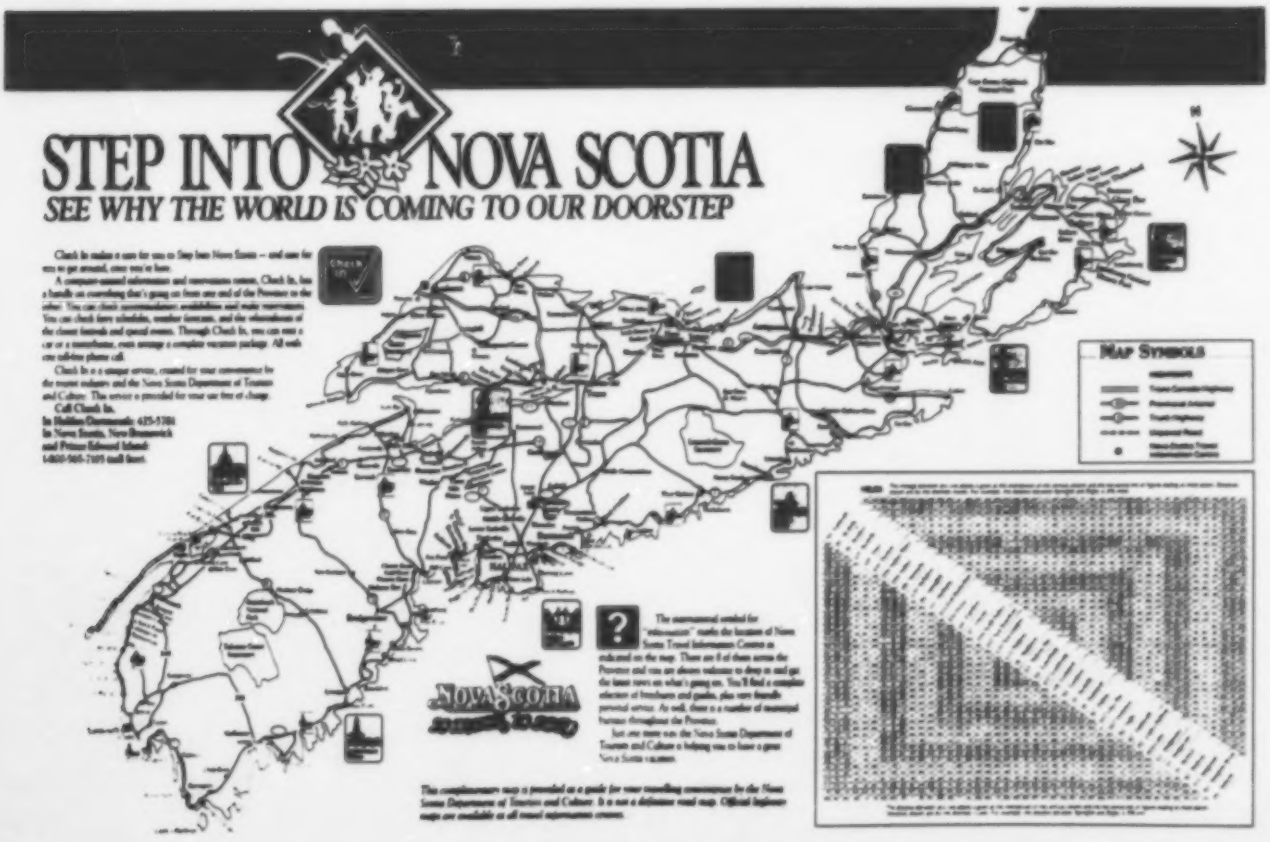
Travel Trade — Fulfillment and Servicing

The travel trade division produces specialized *literature* for the travel trade. A lure/shell brochure is available for imprinting to help with the promotion of programs into Nova Scotia. In 1990, the Motorcoach Lap Map will be revised and updated for distribution to motorcoach tour participants. The Lap Map is a stylized version of the Highways Map suitable for motorcoach use, and has become a very popular item with tour participants.

The Travel Trade division also assists with the distribution of a privately produced "Group Tour Planning Guide", designed to assist tour wholesalers and operators.

In 1990, new "Selling Nova Scotia" and "Nova Scotia by Motorcoach" *videos* will be released for distribution to the Travel Trade, introducing the new products and services which Nova Scotia has to offer.





Travel Trade — Development

The *overseas* market presents tremendous developmental opportunities for Nova Scotia tourism.

In these markets, Nova Scotia is positioned as clean and spacious with good scenery, fresh air and water, good facilities and attractions, as well as easy access to outdoor, wilderness and touring vacation experiences.

In 1990, Nova Scotia's efforts in the overseas market will concentrate on the United Kingdom and Germany — the two markets with the best potential.

Renewed efforts by the "Atlantic Canada Tourism Program" in overseas markets will enhance the activities of the overseas program.

In 1990, the following shows will be attended in the overseas market:

World Travel Mart — London
Workshops — Frankfurt
Consumer Shows — United Kingdom

We will work with KLM Airlines to develop cooperative promotions encompassing the Amsterdam-Halifax route.

Tourism Marketing will also work in conjunction with the City of Halifax and interested private sector operators to develop opportunities in Japanese markets.

Outdoor — Advertising

U.S.A.

Publication	Circulation	Ad Size	# of Insertions	Date
American Angler/Fly Tyer		1P 4C B	2	Feb/May
Walking	430,000	2/3 P 4C	2	March/April
Audubon	436,636	2/3 P 4C	2	May/June
Woodalls	275,000	1 P 4C	1	Annual
Field and Stream	365,000	Special Program	2	March/August
Trailer Life (ACTP)	330,000	Special Section	1	Annual

CANADA

Publication	Circulation	Ad Size	# of Insertions	Date
Eastern Woods & Waters	14,774	24-36 P insert	1	TBD
Sentier Chasse/Pêche	65,805	2/3 P 4C	2	April/September
Canadian Sportsman		1 P 4C	1	March

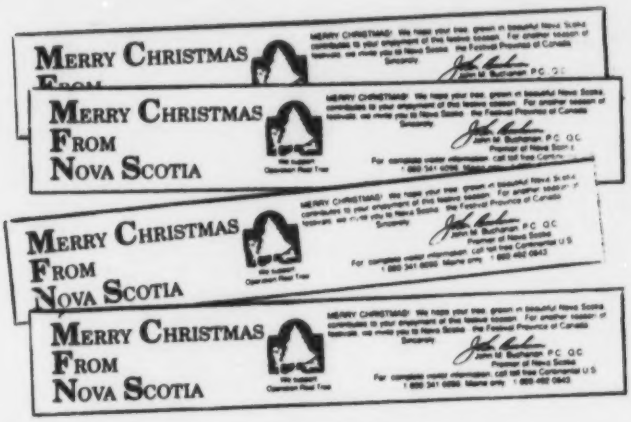
Outdoor — Public Relations & Publicity

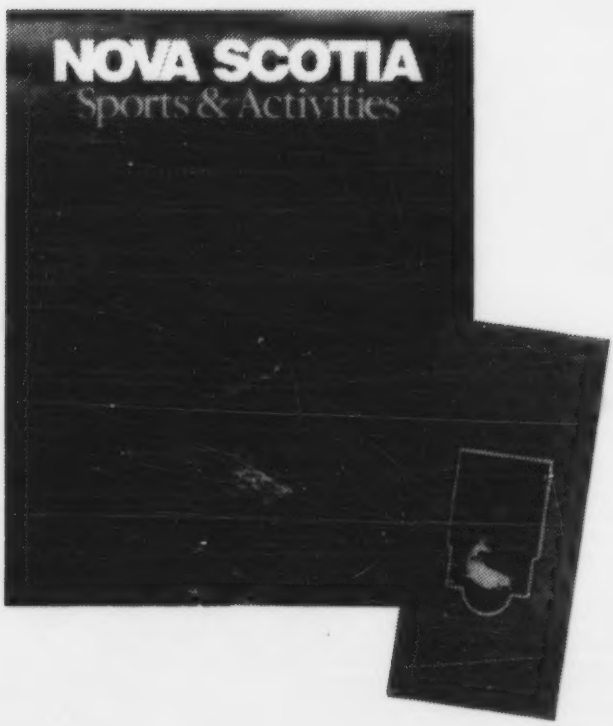
In 1990, the outdoor section will continue to host *familiarization tours* for qualified outdoor writers, photographers and film producers. A total of 43 outdoor familiarization tours were hosted in 1989, resulting in more than $1 million in free publicity when converted into advertising value.

A special *photo shoot* was also arranged as a major promotion with "Field and Stream" Magazine, and Nova Scotia is featured as the outdoor location in the F&S 1990 "Guide to Hunting Wear."

The outdoor section participates in the *Outdoor Writers of America* conference and the *New England Outdoor Writers Association* annual meeting and convention as a means to develop awareness of Nova Scotia's outdoor product.

A new outdoor recreation *video* will be released in 1990 for distribution to tour wholesalers, outfitters, etc., as a promotional resource.





Outdoor — Promotions

In 1990, *Outdoor Sportsmen's Shows* will be attended in the following locations:

January 6-14, 1990	Anaheim, CA
January 17-21, 1990	Tampa, FL
January 31-February 4, 1990	Worchester, MA
February 3-11, 1990	Harrisburg, PA
February 16-25, 1990	Indianapolis, IN
February 22-25, 1990	Springfield, MA
March 1-4, 1990	Boston, MA
March 15-18, 1990	Halifax, NS
March 30-April 8, 1990	Montreal, PQ

Also, special functions for outdoor media and wholesalers will be hosted in Baltimore, Philadelphia and Boston as part of *Sea Sell '90*. As well, special outdoor consumer seminars will be held on board the *Scotia Prince*, targeted primarily to the adventure market.

In 1990, the outdoor section will continue the *Christmas Tree Tag Program* whereby tags promoting travel to Nova Scotia are provided to tree growers for placement on Christmas trees being exported.

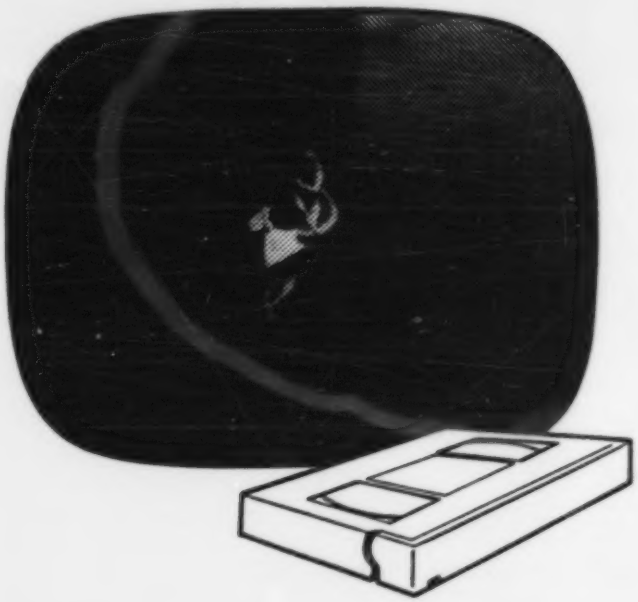
Outdoor — Fulfillment and Servicing

The major fulfillment piece to service outdoor enquiries generated through advertising and promotions is the *Nova Scotia Sports and Activities Guide*. A total of 75,000 Guides will be distributed in 1990 featuring descriptions of the types of outdoor activities available in the province, and information on the operators providing access to these activities. For the first time, the 1990 *Sports and Activities Guide* also features private sector advertising.

A Fishing Guide Map will be produced as a guide to fishing locations throughout the province.

Outdoor — Development

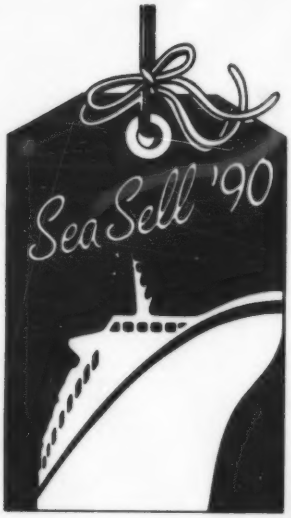
In 1990, increased emphasis will be placed on the *Outdoor Adventure Market* and the promotion of soft adventure activities. Nova Scotia has a wealth of outdoor adventure opportunities, and is well-positioned to take advantage of the increasing demand for such product. This new emphasis will be reflected primarily through the advertising program, however, promotional efforts will also be built to support this emphasis.



The Outdoor section will continue to work with the *Campground Owners Association of Nova Scotia* to assist in developing promotional brochures, in attending outdoor/camping shows in Canada and the U.S.A., and in continuing the developmental process initiated at the November '89 Camping Symposium.

Work will also continue with hunting & fishing *outfitters* to provide technical assistance to new outfitting operations, and in the completion of promotional videos. The outdoor section is working with the Department of Lands and Forests to develop legislation which will institute a licensing program for outfitter guides to be introduced in 1991.

In 1991, *Ducks Unlimited* will hold its annual convention in Nova Scotia, and the outdoor section will continue to work with the organizing committee to ensure the success of this event.



Special Promotions

Sea Sell '90

Sea Sell '90 is a unique, floating tourism marketing presentiton on board the ocean going ferry, the *Scotia Prince*. This is the marketing opportunity of the year for Atlantic Canada's tourism operators and industry partners. After the success of 1987, 1988 and 1989, we have expanded this year's project to the important market of Philadelphia, with repeat visits to Boston and Baltimore.

The key Baltimore/Washington market introduced some 10,000 tour operators, travel agents, travel influencers, meeting planners, media representatives, AAA members and individually invited guests.

In Boston, our traditional U.S. market, Sea Sell '90 will capitalize on previous successes by attracting similar numbers, including travel writers, travel influencers and of course, selected and invited AAA members.

Philadelphia, Pennsylvania, is a high-income, high-density market that lies between New York and Baltimore. This is one of the most powerful markets on the northeast seaboard and is expected to deliver about 2,000 travel influencers, tour wholesalers, travel agents and motorcoach opinion leaders, together with another 6,000 AAA members and invited guests.

From April 16-25, 1990 the *Scotia Prince* will sail from Halifax carrying some 400 Atlantic Canada Tourism Representatives including entertainers, animators, educators and those from the travel industry.

The objectives of Sea Sell '90 are to:

— raise awareness of Atlantic Canada as a desirable tourism destination;

— expose marketing opportunities of the Eastern Seaboard;

— train operators to sell; and

— reach specific travel influencer groups such as qualified consumers, travel agents, motorcoach opinion leaders, meeting & convention planners, outdoor enthusiasts, honeymooners and the media.

This year's Sea Sell campaign will include large space, high-impact newspaper ads in Boston, Baltimore and Philadelphia inviting consumers to come to the travel fair.

Direct marketing is a successful component of the Sea Sell media mix. Lists from AAA, *Smithsonian, Natural History,* Cowles Group, *Travel Agent* and *Walking* Magazine will be used to personally invite consumers, travel agents, meeting planners, seniors and outdoor enthusiasts to specific events on board the *Scotia Prince*.

COME TO OUR FLOATING FESTIVAL!
Visit Canada right here on the Delaware
DATES: Sunday, April 22, 1990
Monday, April 23, 1990
TIMES: 9:00 a.m. - 7:00 p.m. Sunday
9:00 a.m. - 1:00 p.m. Monday
PLACE: Penn's Landing, Philadelphia
Your Friends Next Door, the Atlantic Canada Provinces of Nova Scotia, Prince Edward Island, New Brunswick and Newfoundland and Labrador invite you and your family on board the 1990 Friend Ship M/S Scotia Prince for a wee visit to four lands by the sea that are foreign yet friendly.
Come for the skirl of Scottish bagpipes, the swirl of Highland dancing, French Acadian and Irish fiddlers, red-coated Mounties, maritime folk songs, Anne of Green Gables, the 78th Highland Regiment and maritime crafts. It's North America's largest travel show.
Come meet over 400 representatives of the Atlantic Canada tourism industry, including hoteliers, country innkeepers, fishing and outdoor spectalists, campground operators, tour operators and many others, all of whom will be happy to help you plan an Atlantic Canada vacation.
Come explore the beautiful Scotia Prince. Find out how you can drive your car onto the Scotia Prince in Portland, Maine, and drive off the next morning in Nova Scotia. (Just take Interstate 95 North.) Come explore The World Next Door!
DIRECTIONS:
From the south on Interstate 95, exit at "Conare City, Penn's Landing." From the north on Interstate 95, exit at "Conare City, Tasker St." From the west to the foot of Chestnut St., at Delaware Ave. From the east, across the Benjamin Franklin Bridge (Rte. 676), go left on 6th St. to Chestnut, turn left on Chestnut, to Delaware Ave. Ample parking nearby.
QUEBEC
P.E.I.
ADMISSION FREE
PRIZES GALORE
Snip this out and bring it with you. Drop it into one of the boxes located throughout the ship for a free chance to win fun prizes from Atlantic Canada.
Name
Street
City
State Zip
Telephone ( )
WELCOME ON BOARD THE FRIEND SHIP!
Canada
The World Next Door

Special Promotions — Plans for '91 and '92

As part of a three-year planning process, followup promotions to Sea Sell '90 are being planned with Atlantic Canada partners for two other important markets.

1991	Overseas	Awareness Kick-offs
1992	Canada	"Caravan" Pavilion

In theory, the U.S., overseas and Canadian markets should have a major promotion each and every year. However, resources and dollars restrict the size and scope of our market activities.